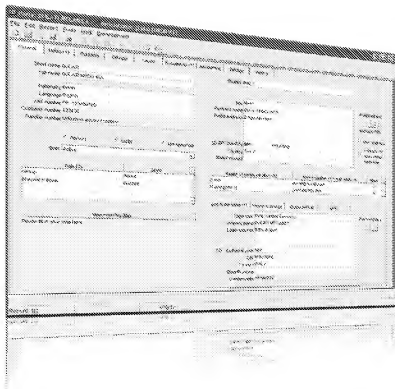


OrdiPat.

Systèmes d'Information pour
la Propriété Intellectuelle

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Lola

Intellectual
Property
Software
Suite

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Introduction

Ordipat, created in 1978, is providing to his customers a full software suite able to manage the work of an industrial property agent. This tool, called Lola, is used by all the main agents of industrial property in France. It offers management for patents, trademarks, models and domain names... it includes the legislations for more than 250 countries for calculation of date of expiry, date of next annuities...

Lola offers a very flexible work-flow system mainly designed and used by big patent attorney's firms. It is build on Oracle technologies and permits the management of big databases, including document handling system. It also includes a internal job-processing engine that enables you to have your system producing documents, calculating, managing and watching due dates 24 hours per day, 7 days per week.

You will find in this document a summary of all possibilities of this software.

Management of any parties (clients, agents, partners...) involved in Industrial Property cases.
Composed of nine tabs:

General

Party's particulars: name, country, group, language, unlimited addresses and means of communication (phone / fax numbers, e-mail addresses) to be used for the elaboration of letters / e-mails either sent directly from cases/parties or through automatic job proceedings, accounting data for connection with invoices and accountancy department, juridical status pointing out the changes with date together with the corresponding list of cases to regularize, persons in charge of the client, characteristics: sending patent legislation, trademark tariffs, domain names rules, mainly for mailing purposes.

The screenshot shows a software window titled 'ORDIPAT - Parties - General'. It contains several tabs at the top: 'General', 'Notes', 'Invoices', 'Contacts', 'Group', 'Language', 'Addresses', 'Means of communication', 'Juridical status', and 'Characteristics'. The 'General' tab is active, displaying a form with the following fields:

- Particulars:** Name (ORDIPAT), Country (FR), Group (ORDIPAT), Language (FRENCH), Address (ORDIPAT), Telephone (ORDIPAT), Fax (ORDIPAT), E-mail (ORDIPAT), and a checkbox for 'Automatic job proceedings'.
- Accounting:** A section for 'Accounting data' with fields for 'Invoice number' and 'Invoice date'.
- Means of communication:** A section for 'Means of communication' with fields for 'E-mail address' and 'Phone number'.
- Juridical status:** A section for 'Juridical status' with fields for 'Juridical status' and 'Date of change'.
- Characteristics:** A section for 'Characteristics' with fields for 'Patent legislation', 'Trademark tariffs', and 'Domain names rules'.

Notes

Management of several kinds of notes: *simple* ones, *main* (displayed in *General* tab of the party) and *alert* notes:

- *Alert* notes when opening the party.
- *Alert* notes meant to the party cases tabs (ex: *Invoices* tab → ask for a total remittance)

A query can be set to display *alert* notes only for specific cases and / or specific tabs of the whole portfolio.

The number of notes is unlimited; when of *alert*, users have to read all of them.

Contacts

To store the clients' representatives (patent dpt, trademark office...) together with his address of correspondence and means of communication.

Specific characteristics can be added (sending patent laws, sending Christmas cards...) as well as his own notes, independently of the *Notes* tab.

The number of contacts is unlimited.

Group

Allow to store parties by group,

The number of parties by group is unlimited.

Cases

All client's cases, displayed according to: the object (patent, trademarks, domain names), the status of the case (in force, abandoned, withdrawn...) and the party role (accountant, holder...) the list of which can be printed.

The number of cases can be displayed or hidden up to the user's choice.

It is possible to open cases for consultation purposes.

Documents

To store any files in the party (letter, invoice, image, report...), under any format.

Can be done manually in the party or being the result of job processings.

Accounting

Various data necessary for the accounting department (client's account number, name of the bank, turnover...), as well as a schedule of reliability so that an alert box be displayed as long as he becomes defaulter, not only in the third party's *General* tab, but also in the different cases where he is mentioned as payer.

Portfolio

The standard criteria with which the Industrial Property cases are worked. These standard criteria can be modified to comply with specific instructions from the clients, (pay themselves their national patents, upon instructions the others), as well as mail addressing such as clients who want to receive the reminders to one address and the invoices to an other.

Settings to display clients' portfolio on the web.

History

To follow what has been done, at what date and by who for checking purposes.

Print screens can be done from any tab.

Letters / e-mails can be generated directly from the party.

Many rights can be allotted to manage parties (users allowed to update parties, to have such tabs...).

The choice of the party "role" automatically displays the functions which follow in cases: a *direct customer* can be *instructing part*, *applicant*, *holder*... whereas a *holder* will remain *holder* only. Clients have thus to be created only once.

Parties are attached to a *Group* when they are subsidiaries. In a near future a new tab will be added to manage *Groups* and *Subsidiaries*.

Merge codes make it possible to retrieve any data for letters, formularies...

Many modules rely on parties' data such as: job processing, mails, cases, annuities, invoices, tariffs, budgets.

Management of any kind of Industrial Property cases: patent, trademark, domain name, model, design, miscellaneous.

Relies on thorough *Case Category* parameters to shape cases according to their specificities i.e.:

- Regional patents, trademarks dispose of a *Country* tab

- Trademark cases dispose of a *Classes* tab

Homogenization of cases tabs display which makes it easy to handle any kind of cases.

Many rights can be allotted to handle cases so that tricky steps of the procedure are managed by few users, including the display of cases tabs.

Print screens can be done from any tab.

Mails / e-mails can be generated directly from the case, independently of the procedure.

Tabs common to all cases

General

Dates, numbers, clients, particulars on the patents/trademarks, criteria for the annuity payment, logo of the trademark.

Up to the user to display the data he wants to see. Clicking the title of columns permute the display (Ex: country of the dates: from the code "FR" to the label "FRANCE"). Placing the mouse cursor on

short labels display complete ones. Selecting a part display its full name, except for *applicant/owner/holder*

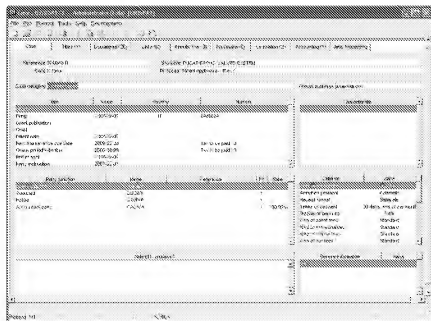
which displays the corporate data and, when these data are not up to date with the party a label appears so that the user constantly knows a change happened but the case is not in compliance.

Double click a party allows to enter its sheet for consultation purposes.

Criteria can be altered for a sole case, ex: all cases are *automatically* paid but this one which is *upon instructions*.

Characteristics which rely on the procedure parameters attached to a step but can be added manually (search pending, grant under process...)

Generalities (number of words, claims, drawings, identification of goods, colour...) give complementary useful information in the case and are also used for the running of other modules



Title

Person in charge of the case (as many responsible as necessary can be stored).

Patent title, trademark name, name of the domain...in whatever languages.

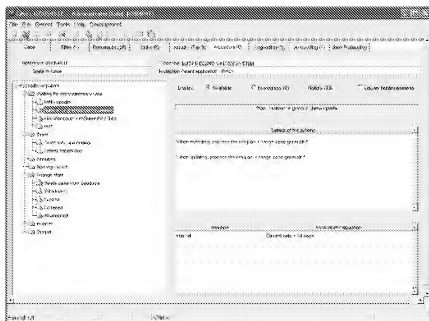
Notes (simple, main, alert).

Storage of any kind of files: pictures, mails, invoices, reports... manually added or saved into Lola or resulting from automatic job processings.

Links

Give a complete view of a family. Example: National French first filing + European Extension + National validations and deriving cases such as the registration in Hong Kong of the British national validation, divisional cases... , and is also necessary for the payment of annuities in some situation (ex: divisionals need the parent date).
Copy of any data (dates, parties, generalities...).
The selection of a linked case displays its own data.
Double click allows to enter the linked case.
Links are created either automatically, by settings, or manually.

Procedure



Relies on thorough settings to follow the lifecycle of cases starting with the administrative preparation, followed by the filing, then the prosecution (search report, official letters, publication...), the grant / renewal, but also whatever can happen during its life: abandonment, assignment (entire/partial), change of corporate name and corresponding regularization, all this procedure being presented under a tree where the final link of the chain integrates the work to do (sending letters, launching tariffs prior to the invoice,

handling official/client/internal terms, having the required programs run to either add dates/parties, or delete characteristics, asking for a "dynamic" and setting *Conditions*.

Three displays are proposed: *Available* to see the entire procedure, *in progress* as long as terms are pending and *history* to follow what happened in the case.

This is the heart of Lola. Every action on a case should be done via a step of the procedure. The steps are set by the main user and the management of the patent attorney firm. It reflects how the firm handle the cases internally.

Legislation

For consultation purposes only.

Relies on complex calculations to manage each case contextually to the law in the country. Takes into account specificities such as: examination proceedings if any for the country, mono or pluri-classes, annual fees due (at the filing at the publication, at the grant), payment of a tax before renewing..., and the schedule of payment pertaining to the case and pointing out the right annuity number including the grace periods.

Allows to follow the changes of corporate data, assignment (partial or total), merge and so on..., being registered or not.
Information comes from the clients *General* data and, in connection with dates of filing of the case, the link is made to know whether the corporate data are up to date or not.
Manual modification can be done to adjust "tricky" cases.

Accounting

Where the invoices / credit notes are elaborated and stored.
Displays 2 main folders *Valorization* and *Invoices*. The *Valorization* folder is spited into two folders to distinguish the *In-progress* valorization from the invoiced one belonging then to the *History*. The *Invoice* folder is also spited into two folders to distinguish the invoices of the procedure from the annuity ones.
Clients criteria are taken into consideration for the elaboration of invoices: preferential fees, exceptional discount...
Co-ownership between accountants is managed following their own rates as mentioned in the case, but remain alterable both as concerns clients and their rates.
Many logs in French and English languages.
Quick checking of tariffs, price scales, currencies. Possibility to recompute tariffs if updated.
Tariffs can easily be added, deleted and amounts altered.
Possibility to valorize tariffs without invoicing the client making thus easy to distinguish the total cost involved in a work with the corresponding amounts invoiced.
Easy conversion of valorization into a draft of invoice.
Possibility to save specific paragraphs keyboarded in a draft of invoice.
Drafts and invoices can be saved into the *Documents* tab of the case in addition to the *Vala/Invoices* one.
Many templates can be set in *Word* to suit clients requirements.
Invoices can easily be converted into credit notes.
Automatic transfer of data into the accounting software (if compatible with Lola).
Possibility to follow the settlement of invoices (total / partial / unsettled) in accordance with the accounting software.

Jobs processing

For consultation purposes only.
Makes it possible to follow in which automatic job processing and at which date, the case has been involved such as renewal reminders, payments, order to foreign agents... (report to JOB PROCESSING chapter).

Specific tabs

Annuity

Allows to follow the stage of prosecution of the current annuity during its process: *pending* up to the time the first reminder is generated, or supplementary reminders sent if no answer from the client is received, including the watching during the "grace" period.
Lists all the dates involved per annuity: reminders, client's instructions, instructions to the foreign agent, invoices... as well as specificities such as the entity, number of granted claims.
Displays the amount paid per client when co-owned and shows the breakdown between disbursement, charges, taxes, fees, with/without VAT and with fine if any.
Data of this tab are the result of automatic job processings. (Report to JOB PROCESSING chapter).

Inventor

This tab allows the storage of the inventors belonging to the invention.
Once Keyboarded data can be retrieved in other cases to avoid double typing.
All inventors' data can be merged to fill-in administrative forms.

Countries

Devoted to cases including a list of countries (European/Regional/Community/International patents or trademarks).

Facilitate the checking of countries designated in a case.

Help user to create sons cases by duplicating data common to cases.

Possibility to manage differences between father and sons cases if any.

Relies on *Convention* settings to get the right countries at the date of filing.

Management of "designated" / "extended" European patent countries as well as Arrangement / Protocole countries for trademarks cases

Checks and adjusts the right payment of the annuities. Ex: the grant of a EP case stops the payment of annual fees and starts the national ones, even for the Netherlands.

Management of community trademarks "seniority".

Possibility from the *Country* tab to enter a specific case by double clicking it.

Web

For consultation purposes only.

Makes it possible to retrieve data following an automatic job processing which queries EPO database. (Report to JOB PROCESSING chapter).

Classes

Displays the classes in the language of the case, classes per classes or synthesis of all classes.

Thorough history of modifications outlining what has been added/deleted/modified.

History of classes in accordance with the procedure (at the filing, registration...)

Many logs going from the whole classes compacted into a single paragraph to all classes separated with a blank or one class per page.

Relies on a complete classes dictionary to help working the common labels.

Possibility to retrieve classes from other cases.

Mass update

Possibility to regularize a whole set of cases.

Devoted to add or modify or delete data.

Possibility to check cases before launching the process.

Generate a log of the corresponding cases: first page = summary of the action, following pages = the concerned cases.

Thorough history in the cases (previous value, new one)

The list of possible mass update actions is as follows:

Title

Adding / modifying / deleting both short and complete titles in any cases.

Adding / modifying / deleting any cases notes including optional display of an alert box and/or on the *General* tab in any cases.

Documents

Importing documents from other cases or files in any cases.

Classes

Importing classes labels from other cases (for trademark cases only).

State case

Placing any cases into another state (ex: from *In force* to *Abandon*).

some state makes it possible to send a corresponding letter to the client or foreign agents following the corresponding automatic job processing.

Responsibility

Adding / modifying / deleting both the department and/or person in charge in any cases.

Responsible of procedure

Altering the person in charge of procedure steps as well as his pending terms for any cases.

Characteristics

Adding / deleting characteristics in any cases.

Parties

Adding / modifying / deleting parties in any cases, including the management of rates when the role of the clients supposes so (accountant).

Interveners

Adding / modifying / deleting interveners in any cases (inventors for patents, contacts for domain names...).

Dates & Numbers

Adding / modifying / deleting dates and numbers in any cases.

Generalities

Adding / modifying / deleting generalities the list of which depending on the object of the cases.

Patents: number of words, pages, claims, drawings...

Trademarks: nature, identification, language...

Annuity payment

Devoted to regularize patent cases for which the client is based on an *Upon instructions* process.

Takes care of previously received amounts. Possibility to send the corresponding instructions letter to the foreign agents and to establish the corresponding invoice to the client. (for patent cases only).

Annuity formalities

Devoted to the regularization of cases by mentioning dates; at which the official receipt of payment was received, or at which the foreign agents sent their acknowledgement of receipt, or the date given by a client who wants to proceed himself with the payment of the annuities of his cases. (for patent cases only).

Links update/copy

Devoted to link cases together. Particularly useful to regularize registration, assignments... of cases.

Cost estimates

Establishment of any kind of cost estimates thanks to cases generalities and tariffs set on templates.
Automatic retrieval of cases generalities with possibility to alter them for the whole cost estimate of for some countries.

Automatic retrieval of the accountants and rates with possibility to alter them for the whole cost estimate or for some countries.

Possibility to alter amounts after automatic calculation or to add / delete lines of tariff or even recompute it if updates occurred.

Easy checking of tariffs and price scales.

Several different shape of logs.

Two displays: total per country or total per country with detail of each tariff.

Possibility to move countries.

Easy transformation of cost estimates into invoices whose history is attached to each case involved.

Valorization direct entry

Management of invoices received from foreign agents being either one invoice per case or one invoice for several cases.

Two displays to manage either annuity or disbursements for the procedure of cases.

Possibility to break the amount into disbursements, official taxes, fees, charges if given by the agent.

Automatic entry into the *Valo/Invoices* case tab and automatic sending into the accounting software if compatible with Lola.

Possibility to cancel a disbursement.

Easy checking of cases.

Timework direct entry

Registration of timework either by the concerned person or by a paralegal in charge of several engineers / jurists.

It is not compulsory the case exists to use this screen, but if the case exists the corresponding entry into the *Valo/Invoices* case tab is automatically effected.

Possibility to enter either the time worked, or the beginning/ending time, or to start a chronometer.

Possibility to valorize a number of hours worked but invoice differently the client.

Easy checking of the tariffs and price scales as well as cases and several readings of data (per day/clients/cases).

Many logs including the transfer into Excel.

Tariffs printings

Different ways of printing tariffs through templates shaped by the users.

Clients prints: query to comply with the clients specificities such as methods of payment, updating dates, currency, language.

Internal prints: to help user in his every day work. (ex: renewal fees for a country are declined in many variables (patents, utility models, additions, ccp, with fine, without fine, discount...); the print of the whole tariffs will thus avoid to forget unusual cases.

Legislative tariffs per country. The user can choose to print all tariffs attached to one country or only one.

Tariffs edited from plans

Shaping of a specific frame to export tariffs to Excel.

Preferably used to comply with outstanding clients requirements.

TERM HANDLING

Checking terms is given top priority in Lola it is why several ways of doing so are proposed:

Cases terms:

- . Internal / Client / Official / Deadline terms, manual or pre-calculated.

Most of the time cases terms belong to parameters set in steps of the procedure which means that when the step is launched they are automatically displayed. Some are said to be *manual* (users having to precise the date), while others are automatically calculated (users having only to check them). The chronology of the different terms has to be respected and supposes that the *Client* and *Internal* terms come before the *Official* and *Last* ones; a control is made to avoid errors.

As concerns the watch over, the user has constantly at his disposal his own terms in the main page, the list of which can be printed under several shapes. It is also possible to share terms with colleagues. An other way is the setting of specific queries and have them run when needed; this is particularly useful for a whole department having to deal with the terms of several responsables. Report to *Deadline* chapter (page 9).

Legislative terms:

- . Annuity payment: due date with / without fine
- . Examination request
- . Trademark renewals: due date with / without fine
- . Trademark intermediary formalities (Affidavit, Proof of Use, Declaration of Intent to Use)

These terms are not individually managed by user, but taken in charge by the automatic job processings and rely both on legislation and data of the instant cases. Ex: the date needed to start the payment of annuity/renewals is stored in each case (*filing* for French patents, *grant* for US, *filing* for French trademarks, *registration* for US...). As soon as this date is mentioned in a case, the dates of payment are calculated in accordance with the corresponding schedules. On an other hand, automatic job processings run whenever necessary to manage each case so that the required formalities be complied with in their due time.

MAIL MANAGEMENT

Manages all kind of mails (letters, forms) with *Microsoft Word* generated either manually or through automatic job processings.

Can be sent directly from parties, cases or attached to steps of the procedure.

Can be saved into cases or parties either manually or automatically, following a job processing.

Ordered by object and family for easy search and automatic job processings retrievals.

Can be established in several languages.

Establishment of basic templates to avoid redundant settings.

Possibility to set the display of addresses per country (useful for countries with many lines of addresses such as Japan).

Connected to parties settings data (addresses, language...).

Thorough merge codes library to fill-in any kind of data, in any context:

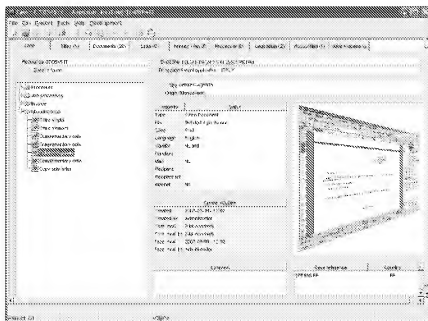
- . Mail belonging to renewals / payments... allow several displays (one case per letter, several cases per letter i.e. listing)
- . Connected to many modules mainly parties, but also tariffs, cases
- . Invoices data to fit the customer (with/without vat, amount settled entirely / partially with balance, double currency display...)

Documents

Manages documents that can be linked to cases and stored inside the database.

All kinds of documents such as the picture of the logo, mails, invoices... are stored and linked to any cases.

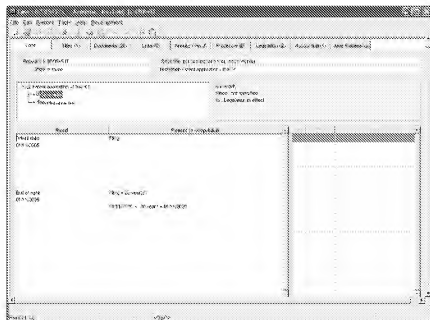
A complete query engine makes it possible to retrieve any documents stored in the database.



Legislation

Management of legislative requirements per case:

- Filing date of a French patent application calculates its expiration (20 years), Certificate of Utility (7 years),
 - U.S. patent granting date starts payment of maintenance fees,
 - Portuguese trademark Registration date stipulates as next formality the declaration of intent to use, whereas in France it is the renewal,
 - no payment of annuities for PCT cases,
 - Domain names period and rules,...
- Manages other terms such as examination and trademark formalities as well as information: mono or multi classes country.
- History of date of change to place each case into its own legislative environment.



Job processing

This is another part of the heart of Lola. There is a specific engine that can be set and followed by the users.

Automatic processing

Management of automatic job processing for set of cases

Gathers the different actions used by the automatic processing management to effect immediate or postponed work,

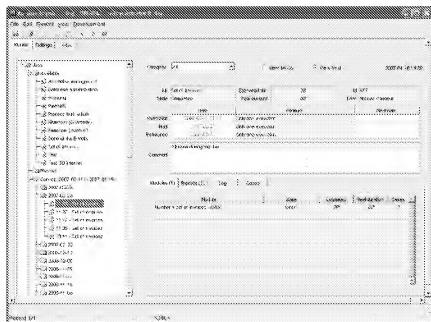
Import of external data such as data coming from the EPO database, (exception made of input from the web),

Import of existing data for the use of the payment company *Acumass*,
Generate documents such as letters, invoices as well as reports in which concerned cases are listed,

Specific tabs devoted to settings by theme (annuities, trademarks, terms), and to the launching of the jobs,

Possibility to set periodicity for recurrent jobs so that they run by themselves,

Several displays to facilitate the search and work.



Anomaly

Manages anomaly reports according to rules settings, ex: case for which a payment is occurring, but the accountant party is missing, foreign cases without agent in charge, next annuity or renewal having a date in the past...

Lists of cases under anomaly run regularly so that user update accordingly the files.

Deadline

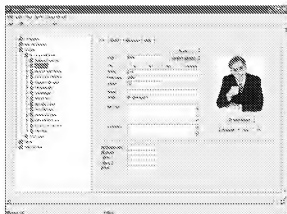
Management of specific and unlimited queries to gather cases having pending terms in the procedure.

Corresponding logs established for a given period of time.

Settings

Users

Management of how users are entitled to handle cases, modify data, work the procedure, update tariffs, manage third parties..., through various authorizations.



The user's page is composed of four tabs:

User: i.e. particulars: Login, first name, department, phone number, e-mail address....

Rights: divided into themes: cases, laws, third parties, mass update, menus...

Preferences: number of answers, last cases recently worked with, specific data for rapid identification in a list,

Menu: the tree composed of the different folders the user is *authorized* to work with.

Cases category / Links

Takes into account the settings which allow cases to work their adequate working environment (European patent, Community trademark, generic Domain Names...).

Aim at putting the cases into their specific protection in connection with the country laws.

Supply everything that is necessary to look after the lifecycle of cases displayed under a tree where main operations integrate steps on which the work relies: actions, terms, mails, invoices.

The management of a *Dynamic* procedure is possible.

Conditions and rights can be set to give further security.

Freedom is let to display data of the *General* cases tab (dates, parts, tabs...).

Links provide considerable help by connecting cases together and copying the necessary data when opening corresponding cases.

Cases elements

Setting of elements: dates, characteristics, parties, criteria and general information according to the case: patent, trademark, design...

Setting of labels in foreign languages.

Possibility to rule chronology in the dates: *Filing* date comes before *Publication* date... and establish the listing of cases not in compliance with them.

Setting of bank holidays in the calendar displayed when double clicking a date cell.

Conventions

List of *Conventions* in which are listed the countries belonging to it pointing out their date of entry (and exit if any).

Ex: *European convention* including the list of *Designated* countries and the list of *Extended* ones means that when a European case is opened the list of countries displayed will spot on the right ones. This avoid errors and is of great help when taking over cases filed years ago.

Classes' catalogue

List of international classification labels per class.

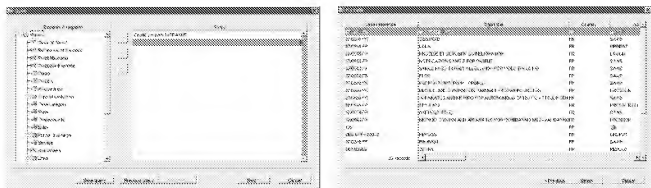
Possibility to have specific label class per country and party.

Archival storage

Management of cases storage for easy and rapid retrieval inside or outside the office.
Automatic exchange of data for the archival department.
The reference number allows to find the case either inside the Office or elsewhere.
Specific queries to know where the case can be found.
Logs when many cases are involved.
Possibility to share archived case with someone else.

Other tools

Search engine (Cases, parties, tariffs...)



Common to all modules:

Content of any data in the cases such as dates, numbers, clients, title of the patent, name of the trademark, classes, countries, documents, a part of a text contained in a document (mail, invoice, text of the classes...), a specific annuity number, a due date of payment.

Result of the query produces a list from which the user can either have a simple look at the case, without leaving the list, (to ascertain a number, a date, a renewal fee number...), or to enter into the case for work purposes (to update a date/number, to modify a client...).

Users can set their own columns display.

Possibility to export data of the list into Excel.

Possibility to limit the number of answers to avoid decreasing the power resource consumption of the database.

Possibility to have item queried saved.

Query management – (Cognos tools)

An other software that can query the whole database to elaborate specific reports with use of a specific catalogue suitable to administrators and trained users.

Impromptu reports are also used for logs resulting from automatic job processing.

Main Menu

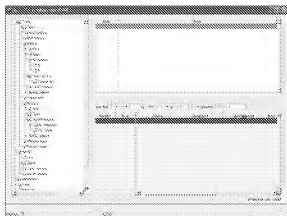
Folders displayed in the user's tree rely on his preferences, rights and settings.

Display of the connected user's terms where out ones appeared in red.

Possibility to share deadlines between colleagues.

Several displays and logs offered, independently of users own settings for deadline (report to previous page).

Personal agenda where messages resulting from automatic jobs can be found also (*First reminder deadline December 31st, 2006 job terminated*).



General information

Language

French, English (call for further information).

Education

<u>Working with Lola</u>	11 days	<u>Setting</u>	2 days
Parties	1	Cases category / Links	1
Patent cases	1	Cases Elements	½
Trademark cases	1	Users	½
Terms	½		
Mails / Template letters	1		
Annuity management	½	<u>Query management</u>	2 days
Automatic job processing	1		
Mass Update	1	Cognos tool	
Registration	1	(max: 3 days)	
Tariffs (incl. logs)	1		
Valorization / Invoices	1		
Disbursement and			
Timework direct entry	½		
Budgets and Cost-estimate	½		

A complete support is given per training and per attendee.

Assistance is given, whenever necessary, to person having followed the corresponding education.

Lola courses fees are entitled to the benefits of in-house training budget.

The groups are limited to 6 persons, 3 for the Query management courses.

Contact

Feel free to contact us if you need further information about Lola or Ordipat activities.

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